Case No. 06CEPR00111

Atty

Sarah Ashleigh Mommer (GUARD/E) Case No. 06CEPR00
Amador, Catherine (for Rhonda L. Mommer – Mother – Guardian – Petitioner)
Petition by Guardian for Leave to Refinance Real Property from Ward's Estate
(Prob. C. 2501, 2502, 2550)

Age: 12			RHONDA L. MOMMER, Mother and	NEEDS/PROBLEMS/COMMENTS:
			Guardian of the Estate, is Petitioner.	Note: Petitioner was appointed Guardian
			Petitioner states a judgment on the	of the Estate without bond, and is not
			dissolution of Petitioner and Decedent was	authorized to take possession of money
Cor	nt. from 080712	2	entered on 6-6-08 (after Decedent's	or any other property without a specific court order pursuant to Order 4-3-06.
	Aff.Sub.Wit.		death) in which the family residence (the	Nothing further occurred in this
~	Verified		DeWitt House) was awarded 73.339%	guardianship estate since that date (no
H	Inventory		interest to Petitioner and 8.887% interest to	assets inventoried, no account).
1	PTC		each of the three minor children. Petitioner was appointed guardian of the estates of	Continued from 8-7-12. As of 10-2-12,
+		1	all children and managed their estates,	nothing further has been filed.
	Not.Cred.	1	including their interests in the DeWitt	
$\parallel \ \ \parallel$	Notice of Hrg		House.	This guardianship estate has no assets. No inventory and appraisal or
~	Aff.Mail	w/o	5	account has ever been filed. The
┢┷╅	Aff.Pub.	W/O	Petitioner states two of the children have	Court cannot make any orders
1		1	reached majority, and Sarah is now 12. Petitioner has remarried and she and	regarding assets not inventoried as
	Sp.Ntc.	<u> </u>	Sarah now reside with Petitioner's	assets of the guardianship estate.
	Pers.Serv.	<u> </u>	husband. The DeWitt House has been	From a review of Court records, it
	Conf.		rented for approx. two years.	appears that:
╟─┼	Screen Letters			- Petitioner was appointed guardian
			Petitioner, for herself and as guardian of	of the estate for the three minor
-	Duties/Supp		Sarah's estate, along with the older children, now wish to refinance the DeWitt	children in anticipation of receipt of assets from their father's estate.
	Objections		House to consolidate the existing first	- However, the Estate of Gordon
	Video		mortgage and equity line into a single	Mommer 05CEPR01325 was never
	Receipt		mortgage to reduce the term and interest	concluded or distributed.
4	CI Report		rate. The first mortgage is at 5.75% and	- There was also a pending family law
	9202	V	Petitioner is informed she should qualify to	dissolution case 02CEFL04083.
	Order	Х	reduce that rate by a full point. The second mortgage has a variable interest	- On 6-6-08, some assets, including interests in the house, appear to have
			rate. Therefore, Petitioner seeks an order	been distributed directly to the minors
			permitting her to refinance the DeWitt	pursuant to a stipulated judgment
			House pursuant to Probate Code	between Petitioner and the Fresno
			§2501 (a) (2). Petitioner hopes to	County Public Administrator (as personal representative of the estate)
			consolidate the existing debt on the	in the family law dissolution case.
			property, reduce the interest rate and expense of same, and reduce the	- <u>However, no assets were ever</u>
			remaining term on the debt. If	inventoried in the guardianship
			consolidation is available, she will be able	estates. Therefore, the Court cannot address this petition at this time.
			to afford to replace the carpet with the	dadiess inis pennon ai mis nine.
			monthly savings she will realize from the	Need Inventory and Appraisal and
			transaction If consolidation is not available, Petitioner will attempt to	account current.
			refinance the first mortgage only, still	SEE PAGE 2
	Aff. Posting		reducing the interest rate, but will increase	Reviewed by: skc
	Status Rpt		the amount of debt to include the cost to	Reviewed on: 10-2-12
	UCCJEA		replace the carpet (\$5,000.00). This will	Updates:
	Citation		make the house more marketable as a rental. Petitioner expects the monthly	Recommendation:
	FTB Notice		payments to remain roughly the same, but	File 1 - Mommer
			the term will be reduced by approx. three	
			(3) years. Petitioner states both of Sarah's	
			siblings (who have reached majority)	
			support the proposal.	

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Sarah Ashleigh Mommer (GUARD/E)

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The Court has set additional status hearings as follows and mailed notice to appropriate parties:

- Friday 10-26-12 for failure to file Inventory and Appraisal pursuant to Probate Code §2610 and failure to file
 first account pursuant to Probate Code §2620(a), and failure to file a final account pursuant to Probate
 Code §2630 or waiver pursuant to Probate Code §2627 in related guardianship estates 06CEPR00109 (Lars,
 age 18+) and 06CEPR00110 (Briana, age 18+).
- Friday 10-26-12 for failure to file Inventory and Appraisal pursuant to Probate Code §8800 and failure to file a
 first account or petition for final distribution pursuant to Probate Code §12200 in the probate estate Estate of
 Gordon Mommer 05CEPR01325.

2 Walter Salwasser (Estate)

Atty

Case No. 07CEPR00656

Chielpegian, Michael S. (for Marvin R. Salwasser – Administrator with Will Annexed/Petitioner)

First and Final Report of Status of Administration on Waiver of Account and Petition for Final Distribution; for Allowance of Ordinary Services by Attorney's; for Allowance of Extraordinary Services by Attorneys; for Allowance of Ordinary Services by Personal Representative; and for Reimbursement of Costs Advanced

DOD: 03/07/07	MARVIN R. SALWASSER, Administrator with Will	NEEDS/PROBLEMS/COMMENTS:
	Annexed, is Petitioner.	1. Need Notice of Hearing .
	Accounting is waived. I & A - \$2,683,584.33	Need proof of service of Notice of Hearing at least 15
Cont. from Aff.Sub.Wit.	1 & A	days before the hearing on all interested parties.
✓ Verified ✓ Inventory	Executor - \$39,835.84 (statutory)	3. Costs reimbursement request in the amount of \$19,226.18
✓ PTC ✓ Not.Cred.	Attorney - \$39,835.84 (statutory)	includes \$530.40 in "Xerox Charges". Pursuant to Local Rule 7.17(B)(1), photocopy
Notice of Hrg X Aff.Mail X	Unpaid previously ordered Attorney x/o – <u>Fees</u> <u>Costs</u>	charges are considered by the court as part of the cost of doing business and may be
Aff.Pub. Sp.Ntc.	\$403,004.00 (1) \$121,143.50 (2) \$5,289.79 (2)	disallowed.
Pers.Serv. Conf. Screen	\$524,147.50 total \$12,095.49 total 1. Unpaid fees and costs granted by Order of the Court on 09/02/10 and not yet paid.	
Letters 05/07/08 Duties/Supp	Unpaid fees and costs granted by Order of the Court on 07/06/11 and not yet paid.	
Objections Video Receipt	Attorney x/o - \$142,331.00 (Per itemization for litigation to benefit estate and protect its interests and	
Cl Report ✓ 9202	preparation of this petition. Consented to by all interested parties.)	
✓ Order Aff. Posting	Costs - \$19,226.18 (per itemization for filing fees, certified copies, appraisal fees, recording	Reviewed by: JF
Status Rpt	fees, and fees related to litigation)	Reviewed on: 10/03/12
UCCJEA	Distribution, pursuant to Decedent's Will and 1st and	Updates:
Citation	2 nd Codicils thereto, is to:	Recommendation:
FTB Notice X	Dorothy Salwasser, Administrator of the Estate of Denis Salwasser - 1/3 interest in tangible articles of personal property of Decedent	File 2 - Salwasser
	Gary Alvin Salwasser- 1/3 interest in tangible articles of personal property of Decedent	
	Marvin R. Salwasser - 1/3 interest in tangible articles of personal property of Decedent	
	Marvin R. Salwasser, Trustee of the Walter Salwasser 1995 Family Trust- residue of the estate	

Atty

Kruthers, Heather H (for Petitioner Public Administrator/Administrator)

(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for (3) Distribution [Prob. C. 9202, 10800, 10810, 10951, 11600, 11850(a)]

DOD: 10/23/2010		PUBLIC ADMINISTRATOR, Administrator, is	NEEDS/PROBLEMS/COMMENTS:
		petitioner.	
		Account period: 10/23/10 – 8/3/12	
Со	nt. from	Accounting \$392 459 77	
	Aff.Sub.Wit.	Accounting - \$382,659.77 Beginning POH - \$371,758.64	
✓	Verified	Ending POH - \$314,828.49	
✓	Inventory		
1	PTC	Administrator - \$10,000.53 (statutory)	
√	Not.Cred.	Administrator x/o - \$1,248.00 (for	
		sale of personal property and preparation	
✓	Notice of Hrg	of taxes.)	
✓	Aff.Mail W/		
	Aff.Pub.	Attorney - \$10,000.53 (statutory)	
	Sp.Ntc.	(sidiolory)	
	Pers.Serv.	Bond fee - \$1,674.14 (o.k.)	
	Conf. Screen	. , , , ,	
✓	Letters	Court fees - \$420.00 (filing	
	Duties/Supp	fee, certified copies)	
	Objections	Closing reserve	
	Video	Closing reserve - \$5,000.00	
	Receipt	Distribution, pursuant to intestate	
	CI Report	succession, is to:	
✓	9202		
✓	Order	Margaret Barberick, sister - \$286,049.79	
	Aff. Posting		Reviewed by: KT
	Status Rpt		Reviewed on: 10/3/12
	UCCJEA		Updates:
	Citation	-	Recommendation: SUBMITTED
✓	FTB Notice		File 3 - Nicholas

4 Oralla Hope Lewis (CONS/PE)

Case No. 10CEPR01069

Atty Bagdasarian, Gary G. (for Petitioner/Conservator Amy Ihde)

(1) First and Final Account and Report of Conservator, (2) Petition for Reimbursement of Costs Advanced by Conservator; (3) for Attorney's Fees and Costs Advanced by the Attorney; (4) for Discharge of Conservator and (5) for Authority to Liquidate the Estate by Summary Disposition [Prob. C. 1060-1064; 1860; 1861-1863; 2620; 2623; 2631; 2640]

DOD: 2/29/12			AMY IHDE, Conser	vator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Account period: 2	/18/11 – 2/29/12	
Cont. from 071912, 082112		Accounting - Beginning POH Ending POH	\$71,773.18 - \$58,947.53	Continued from 8/21/12. Minute Order states Counsel is directed to submit a declaration that refers to the second declaration	
√	Aff.Sub.Wit. √ Verified		Subsequent Accor 2/29/12 – 4/24/12	unt period:	filed on 8/9/12 as well as the accounting.
	Inventory PTC		Accounting - Beginning POH Ending POH		
√	Notice of Hrg		Ending POH	 \$28,057.65 (\$24,557.65 is cash) 	
✓	Aff.Mail	W/	Conservator -	waives	
	Aff.Pub.		Conservator costs	- \$1,536.48 (burial fees,	
	Sp.Ntc.		pastor, death cert. etc)		
Pers.Serv. Conf. Screen Letters Duties/Supp		Conservator costs - \$2,991.50 (attorney fees paid to Mr. Bagdasarian from personal funds)			
-	Objections		<u>'</u>	C11 / FF 00 //o.e.	
Video			Attorney	- \$11,655.00 (less by Conservator from her	
Receipt			a balance of \$8,663.50,		
CI Report				r for conservatorship	
		administration, 26.8	30 hours @ \$250/hr for sale		
✓	Order			nd 16.90 hrs @ \$200/hr for	
	Aff. Posting		accounting.		Reviewed by: KT
Status Rpt		Closing reserve	- \$1,000.00	Reviewed on: 10/3/12	
	Citation FTB Notice Clossifig reserve \$\frac{1}{27},000.00\$ Conservatee died on 2/29/12. Petitioner requests distribution of remaining property on hand to decedent's heirs pursuant to Probate Code §13100.		CIO311 19 16361 V6	- ¥1,000.00	Updates:
			Recommendation: File 4 - Lewis		
			Please se	e additional page	

4 (additional page) Oralla Hope Lewis (CONS/PE)

Petitioner prays for an Order:

- 1. Approving, allowing and settling the first and final account;
- 2. Authorizing the reimbursement to conservator in the amount of \$4,257.98;
- 3. Authorizing attorney fees in the amount of \$9,508.50;
- 4. Authorize distribution of the remaining property, pursuant to Affidavits Under Probate Code § 13100 to:

Case No. 10CEPR01069

a. Tom Grooms (son) - \$1,986.24
 b. Dennis Grooms (son) - \$1,986.24
 c. Gael Classen (daughter) - \$1,986.24
 d. Carolyn Grooms(daughter) - \$1,986.24
 e. Cathy Ward (daughter) - \$1,986.24

Declarations filed by Gary Bagdasarian state:

- The accounting was prepared based on number provided by the CPA. The attorney was
 required to provide additional correspondences to the Conservator to obtain proper descriptions
 of various items.
- The Attorney was required to make a court appearance on the status of the accounting due to delays caused by the Department of Health Services Claim.
- The Conservatee died during the account period. Therefore an accounting was required to the date of death and another accounting subsequent to the date of death.
- The attorney prepared 13100 affidavits to pass the remaining property to the heirs of the conservatee.
- The attorney was required to obtain from the conservator billing statements for the residential care home the where the conservatee resided.

Mr. Bagdasarian states he is willing to reduce his rates for the preparation of the accounting to \$200.00 per hour for a total of \$3,3800.00, a reduction of \$845.00.

An Ex Parte Request for an Order Shortening Time in Connection with the First and Final Account was presented to the court. The request alleged that a request was made by one of the beneficiaries to have a decision as soon as possible due to a hardship involving ill health and potential homelessness should there be a delay. The Court after considering the information approved distribution to Gael Classen only in the amount of \$1,817.24 and that all remaining issues shall remain set.

Petition for Attorney Fees and Costs

			STEVEN MATLAK , Petitioner, is the attorney for	NEEDS/PROBLEMS/COMMENTS:
			Janie Jimenez.	N. I. B. S. A. Birland T. Janes (III)
			JANIE JIMENEZ was appointed Limited Conservator of the Person on 7-16-12.	Note: Perine & Dicken, Trustees of the Special Needs Trust, filed Notice of Non-Opposition to the petition.
>	Aff.Sub.Wit. Verified Inventory		PERINE & DICKEN , Professional Fiduciaries and Conservators, are the Trustees of the Josephine Diaz Special Needs Trust.	1. Need order.
	PTC			
	Not.Cred.		Petitioner requests \$3,426.50 in connection	
~	Notice of Hrg		with the representation of Ms. Jimenez in connection with her appointment as conservator.	
~	Aff.Mail	W		
	Aff.Pub.		The services were for the benefit of the	
	Sp.Ntc.		Conservatee and included conferences	
	Pers.Serv.		with client, CVRC, preparation of capacity declaration and instructions to the doctor,	
	Conf.		review and analysis of reports, attendance	
	Screen		at hearing.	
	Letters			
	Duties/Supp		Petitioner states the Conservatee has no	
	Objections		assets of her own to pay the costs of establishing the conservatorship. The	
	Video		trustees of the Special Needs Trust agree	
	Receipt		that the conservatorship is warranted and	
	CI Report		that a reasonable request for	
	9202		reimbursement from the Special Needs Trust	
	Order	Χ	would be appropriate.	
	Aff. Posting		Declaration indicates 12.2 attorney hours @	Reviewed by: skc
	Status Rpt		\$185-210/hr and 4 paralegal hours @ \$75/hr,	Reviewed on: 10-3-12
	UCCJEA		a total of \$2,549.00, plus costs of \$877.50	Updates:
	Citation		including filing and service, for a total of	Recommendation:
	FTB Notice		\$3,426.50.	File 5 - Diaz

Atty Magness, Marcus, of Gilmore Wood Vinnard & Magness (Petitioner)

Petition for Attorney's Fees & Costs (Probate Code 1472)

Age: 54 years			MARCUS D. MAGNESS , Attorney retained by the Conservatee on 3/23/2011 to oppose the <i>Petition for Appointment of Conservator</i> , is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
Cont. from Aff.Sub.Wit.			PUBLIC GUARDIAN was appointed Conservator of the Person and Estate on 3/6/2012.	
✓ Verification Inverse PTC Not.Co ✓ Notice ✓ Aff.M Aff.Pu Sp.Nt Pers.S Conf. Letter Dutie Obje Video Rece CI Re 9202 ✓ Orde	ed Intory Cred. Ice of Hrg Icail Ib. Ic. Serv. Iscreen Irs Ics/Supp Ictions Ico Icinos Ico Icinos Ico Icinos Ico Icinos	W/	 Petitioner states: He was retained by the Conservatee to oppose a petition for appointment of conservator of the person and estate filed by two of his children, KATRINA LEAL and JASON HERMOSILLO; In connection with such representation, his Firm prepared pleadings, prepared and responded to discovery, made Court appearances, met with the client, interviewed numerous family members, engaged and coordinated with expert witnesses, and otherwise handled the litigation associated with the Conservatorship proceeding (please refer to detailed itemization in Declaration of Marcus D. Magness attached as Exhibit A); Petitioner is advised that the Conservatorship estate includes a ½ community property interest in 10 parcels of real property comprising numerous rental units; While the Conservatee's estranged wife was less than forthcoming concerning responses to discovery to learn the extent of the Conservatee's other assets, the estate is capable of paying for the legal fees for services rendered and to reimburse for costs advanced; Petitioner believes that \$36,702.00 is reasonable compensation for the services performed, taking into 	Reviewed by: LEG Reviewed on: 10/2/12
UCC.	JEA		consideration the time expended, the responsibility assumed, the complexity of the matter, the expertise of Petitioner, and the results achieved; additionally, Petitioner has paid \$5,212.27 in expenses for costs advanced on the Conservatee's behalf in connection with both the Conservatorship proceeding and the accounting litigation;	Updates: Recommendation: File 6 - Hermosillo
			~Please see additional page~	

Additional Page 6, Arthur Hermosillo (CONS/PE)

Case No. 11CEPR00214

Petitioner states, continued:

- Prior to the appointment of the Public Guardian as temporary conservator, the Conservatee paid \$8,961.63 to Petitioner, of which \$7,252.25 was applied to fees;
- Petitioner requests the Court approve this petition and direct the Conservator to pay the sum of \$29,449.75 to
 Petitioner for the Conservatorship estate;
- Petitioner has paid **\$5,212.27** in expenses, of which **\$1,709.38** has been reimbursed by the Conservatee for bills paid prior to appointment of the Public Guardian as temporary conservator;
- Petitioner requests the Court direct the Conservator of the Estate to reimburse Petitioner \$3,502.89 for costs
 advanced on the Conservatee's behalf in connection with both the Conservatorship proceeding and the
 Accounting Litigation (please refer to detailed itemization in Declaration of Marcus D. Magness attached as
 Exhibit A);
- Petitioner holds on deposit in the firm's trust account the sum of \$2,536.51 that belongs to the Conservatee;
 Petitioner requests the firm be allowed to apply the funds held on behalf of the Conservatee in its trust account to the fees and costs being authorized by the Court in this proceeding.

Petitioner requests an Order:

- 1. Authorizing Petitioner to apply the funds of **\$2,536.51** held on deposit for the benefit of the Conservatee toward payment of the legal fees and costs due the firm for services rendered;
- Directing the Public Guardian, as Conservator of the Conservatee's estate, to pay to the firm the sum of \$26,913.24 (representing \$29,449.75, less money held on deposit) for the balance of the sums due for legal services rendered; and
- 3. Directing the Public Guardian, as Conservator of the Conservatee's estate, to pay to the firm the sum of \$3,502.89 to reimburse the firm for costs advanced on the Conservatee's behalf.

Note: Attorney fee itemization indicates a combined total of **111.60 hours** at the attorney rates of **\$315.00**, **\$325.00**, **\$200.00** and the paralegal rate of **\$105.00** per hour. Itemization also includes billing statement for professional services of specialist David I. Margolin, M.D., Ph.D., J.D., totaling **\$4,553.00**.

Betty Jean McCoon (CONS/PE)

Case No. 12CEPR00516

Atty Morris, Rhonda Rene (Pro Per – Non-relative – Petitioner)

Suhr, John (Appeared at 7-10-12 hearing for Petitioner; no Substitution has been filed) Atty

Atty Rindlisbacher, Curtis D. (Court-appointed for Proposed Conservatee Betty Jean McCoon)

Atty Kruthers, Heather (for Public Guardian)

> Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Ag	e: 80		TEMPORARY EXPIRES 7-10 extended to 8-7-12
			RHONDA RENE MORRIS, C
			(concerned friend), is Pet
	nt. from 071012, 0712		requests appointment as the Person and Estate.
	Aff.Sub.Wit.		(The Petition is blank re bo
~	Verified		#1c.)
	Inventory		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
	PTC		Voting rights <u>not</u> affected.
	Not.Cred.		
~	Notice of Hrg		Estimated Value of Estate
~	Aff.Mail	w/o	Personal Property: \$ 30 Annual income: \$
	Aff.Pub.		Annual income: \$ Real property: \$ 1.
	Sp.Ntc.		Redipioperty. ψ is
~	Pers.Serv.	W	Petitioner states she has b
~	Conf. Screen		with her personal needs r
~	Letters		shelter, etc., since August
~	Duties/Supp		apparent that she is unak
	Objections		on her own, and Petitions conservatorship to have t
	Video Receipt		her while protecting both
	CI Report	Χ	Conservatee and Petition
	9202		accountable to the cour
~	Order		continued care.
			A Comment to Decelerate
			A Capacity Declaration v
	Aff. Posting		Court Investigator Julie No
	Status Rpt		report on 7-2-12.
	UCCJEA		
>	Citation		
	FTB Notice		

)-12 (Person only),

a non-relative titioner and Conservator of

and information at

00,000.00 11,000.00 50,000.00

peen helping Betty re: health, food, t 2011. It is very ble to handle this er is seeking the ability to help the proposed ner by being rts for her

was filed 6-15-12.

egrete filed a

NEEDS/PROBLEMS/COMMENTS:

Court Investigator advised rights on 6-26-12.

Continued from 7-10-12, 8-7-12.

Minute Order 6-19-12 (temp): Ms. McCoon consents to temporary conservatorship. Court grants Rhonda Morris Conservatorship of the Person only. Temporary Letters expire 7-10-12. The court further orders that Ms. McCoon not be moved from her home without a court order.

Minute Order 7-10-12: Mr. Suhr informs the Court that he is representing Rhonda Morris and will be submitting a substitution of attorney. Matter continued to 8/7/12. The temporary of the person is extended to 8/7/12.

Minute Order 8-7-12: Counsel informs court their intention is to have Ms. McCoon give power of Attorney to Ms. Morris to assist in her estate. Counsel would like to have Ms. Morris file periodic accountings with the court. Temporary Letters for person only is extended to 10/9/12. Continued to 10/9/12.

As of 10-2-12 nothing further has been filed. The following issues remain:

SEE PAGE 2

Reviewed by: skc		
Reviewed on: 7-5-12		
Updates:		
Recommendation:		
File 7 - McCoon		

7 Betty Jean McCoon (CONS/PE)

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NEEDS/PROBLEMS/COMMENTS:

1. Notice of Hearing filed 6-12-12 does not indicate that a copy of the Petition was included with the notice to Elva Van Buskirk (sister) pursuant to Probate Code §1822. The Court may require further service.

Case No. 12CEPR00516

- 2. Petitioner's Confidential Supplemental Information form contains <u>Petitioner's</u> information instead of <u>Ms. McCoon's</u> information at #1 (name, DOB, SSN, etc.). <u>Need amended form with the proposed Conservatee's information</u>.
- 3. The Petition does not request medical consent powers; however, Petitioner filed a Capacity Declaration that states the proposed Conservatee lacks capacity for medical consent.

If medical consent powers are considered as part of this conservatorship pursuant to Probate Code §2355, the Court may require amendment and further service on the proposed Conservatee and all relatives, including those not previously listed.

4. If granted, bond is required pursuant to Probate Code §2320(c)(4) and Cal. Rules of Court 7.207. Based on the estimated value of the estate including personal property and income, Examiner calculates bond should be \$342,100.00.

Note: If granted, the Court will set status hearings as follows:

- Friday 1-11-13 for filing of bond
- Friday 2-8-13 for filing of Inventory and Appraisal and Review of Bond
- Friday 2-7-14 for filing of First Account

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Atty Tomassian, Gerald M., of Tomassian Pimentel & Shapazian (for Petitioner Maxine L. Abe)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 6/17/2012	MAXINE L. ABE, daughter and named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Full IAEA – O.K.	Note: Court will set status hearings as follows: • March 15, 2013 at 9:00 a.m. in Dept. 303 for filing
Aff.Sub.Wit. S/P ✓ Verified Inventory PTC	Will dated: 6/29/2006	of inventory and appraisal; and • December 13, 2013 at 9:00 a.m. in Dept. 303 for filing of first account and/or
Not.Cred. ✓ Notice of Hrg ✓ Aff.Mail W/○ ✓ Aff.Pub.	Residence – Selma Publication – Selma Enterprise	petition for final distribution. Pursuant Local Rule 7.5, if the
Sp.Ntc. Pers.Serv. Conf. Screen Aff. Posting	Estimated value of the Estate: Personal property - \$165,000.00 Real property - \$165,000.00	documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no
✓ Duties/Supp Objections Video Receipt	Total - \$330,000.00	appearance will be required.
CI Report 9202 ✓ Order ✓ Letters	Probate Referee: Steven Diebert	Reviewed by: LEG
Status Rpt UCCJEA Citation		Reviewed on: 10/2/12 Updates: Recommendation: SUBMITTED
✓ FTB Notice		File 8 - Abe

Atty Rindlisbacher, Curtis D., of Perkins Mann & Everett (for Petitioner Amy M. DeFendis)

Petition for Probate Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D: 6/21/2012		NEEDS/PROBLEMS/COMMENTS:
		Letters of Special Administration expire 10/9/2012	Item 3(f)(2)(b) of the Petition is incomplete re: entitlement of appointment. Need declinations to
Co ✓	nt. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg	AMY M. DEFENDIS, sister-in-law, is Petitioner and requests appointment as Administrator without bond. (All heirs have waived bond.) Full IAEA – O.K.	act as personal representative from each of the Decedent's children, who have priority of appointment pursuant to Probate Code § 8461, or nominations of the petitioner from each of them pursuant to Probate Code § 8465, as follows: David DeFendis, son; Ruth Williams, daughter;
✓ ✓	Aff.Mail W/ Aff.Pub.	Decedent died intestate.	Phillip DeFendis, son.Need proposed order and letters.
	Sp.Ntc. Pers.Serv. Conf. Screen Aff. Posting	Residence – Fresno Publication – Business Journal	Note: Court will set status hearings as follows: • March 15, 2013 at 9:00 a.m. in Dept.
✓ 	Duties/Supp Objections Video Receipt CI Report	Estimated value of the Estate: Personal property - \$1,000.00 Real property - \$70,000.00	 303 for filing of inventory and appraisal; and December 13, 2013 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution.
	9202 Order X	Annual income/RP - \$12,000.00 Total - \$83,000.00	Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be
		Probate Referee: Steven Diebert	required.
	Letters X Status Rpt		Reviewed by: LEG Reviewed on: 10/2/12
	UCCJEA Citation		Updates: Recommendation:
	FTB Notice		File 9 - DeFendis
			9

10 Cora Lee Tucker (Estate)

Case No. 06CEPR00240

Atty Tucker, Eugene (Pro Per – Co-Executor)
Atty Tucker, James (Pro Per – Co-Executor)
Atty Amey, Dorothy (Pro Per – Co-Executor)

Status Re: Filing of the First Account or Petition for Final Distribution

Sidios Re. Filing of the riss Account of Felillott for Filid Distribution			
DOD: 12-13-04	EUGENE TUCKER, JAMES TUCKER, and DOROTHY	NEEDS/PROBLEMS/COMMENTS:	
	AMEY were appointed Co-Executors with Full IAEA		
	and bond of \$150,000.00 on 9-5-06. Bond was filed	Note: The former Co-Executors were	
	and Letter issued on 9-29-06.	formerly represented by Attorney Sandra Smith, who is no longer eligible to	
Drie v la a prince va 7 05		practice law.	
Prior hearings: 7-25-	Final Inventory and Appraisal filed 8-11-08 reflects	praelies law.	
11, 10-3-11, 11-7-11,	real property valued at \$95,000.00	Note: The Public Administrator requests	
2-6-12, 060512	(at 12-13-04).	90 days.	
Aff.Sub.Wit.			
Verified	A petition for final distribution was heard on 2-9-09,	Need petition for final distribution.	
Inventory	2-24-09, 3-17-09, and 4-21-09. The matter was	Note: The two outstanding creditor's	
PTC	continued due to various defects and ultimately	claims total \$2,235.93.	
Not.Cred.	<u>denied on 4-21-09</u> .		
Notice of	On 6-5-12, after numerous status hearings, the		
Hrg	Court appointed the Public Administrator.		
Aff.Mail			
Aff.Pub.	Public Administrator's Status Report filed 9-17-12		
-	states Deputy Noe Jimenez met with the family and		
Sp.Ntc.	they decided they would cover all probate fees		
Pers.Serv.	minus the two Fresno County creditor's claims. The		
Conf.	family reported that they were working with the		
Screen	two county agencies to have the claims		
Letters	withdrawn. If they are successful, they will pay all		
Duties/Supp	fees so that the house can be deeded to the heirs.		
Objections	At the family's request, a reappraisal was done to		
Video	ascertain the current market value of the home.		
Receipt	The Public Administrator requests that the next		
CI Report	status hearing be set out 90 days to allow the family		
9202	more time to negotiate with the County of Fresno		
Order	and for the Public Administrator to file the account.		
Aff. Posting	=	Reviewed by: skc	
Status Rpt	4	Reviewed on: 10-2-12	
UCCJEA	4	Updates:	
Citation	4	Recommendation:	
	-	File 10 - Tucker	
FTB Notice		rile 10 - 10CKei	
		10	

Lor, Pahoua C. (for Teresa & Marcelino Morales - co-guardians)

Atty McFadden, Jaimie Estelle (pro per – mother)
Status Hearing Re: Visitation

11

Atty

Serenity, 8		TERESA MORALES paternal grandmother of minor	NEEDS/PROBLEMS/COMMENTS:
Bla	ke, 9	Serenity, and MARCELINO MORALES, paternal step	
		grandfather of Serenity, were appointed Co-	As of 10/03/12, no further documentation has been filed.
		Guardians on 1/6/2011.	documentation has been filed.
Со	nt. from	FATHER of Serenity: STEVEN ARIAS	
	Aff.Sub.Wit.	FATHER OF Blake: ALFREDO VALDEZ	
	Verified	TYMILK OF BIGING. THE RESO VICES	
	Inventory	Mother: JAIMIE McFADDEN	
	PTC		
	Not.Cred.	Paternal grandfather of Serenity: Abel Arias	
	Notice of Hrg	Paternal grandparents of Blake: Unknown	
<u> </u>	Aff.Mail	Maternal grandfather: Thaddeus McFadden	
	Aff.Pub.	Maternal grandmother: Beverly Kendrick	
	Sp.Ntc.	Material grandment. Beverly Rendick	
	Pers.Serv.	On 05/22/12, Jaime McFadden, mother, Petitioned	
	Conf. Screen	for visitation.	
	Letters		
	Duties/Supp	Minute Order from hearing on 07/10/12 set this	
	Objections	matter for status and states: The Court finds that it	
	Video Receipt	would not be a detriment to the children to	
	CI Report	increase the visitation and grants the petition. The Court orders supervised visitation between mother,	
-	9202	father and both children as follows: visitation shall	
	Order Aff. Posting	be on the 1st, 3rd, and 5th weekends of every month	Reviewed by: JF
	Status Rpt	beginning on Saturday at 9:00 am until Sunday at	Reviewed by: 31
	UCCJEA	6:00 pm. Visits shall be supervised by the maternal	Updates:
	Citation	grandmother Beverly Kendrick who will be	Recommendation:
	FTB Notice	responsible for pick-up and delivery of the children.	File 11 – Arias & Valdez
		The guardian Teresa Morales is ordered to be present during the pick-up and delivery process.	
		There is to be no alcohol and/or drugs around the	
		children during visitation, and there is to be no	
		negative comments regarding either party around	
		the children. Counsel is directed to prepare the	
		order.	
-	<u> </u>		

Probate Status Hearing Re: First Account or Final Distribution

DOD: 9/17/2010		NEEDS/PROBLEMS/COMMENTS:	
Comb from: 001410		OFF CALENDAR. Order Settling	
Cont. from 031412,		Report of Administration of Insolvent	
042512, 060612		Estate was signed on 8/23/12.	
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of			
Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf.			
Screen			
Letters			
Duties/Supp			
Objections			
Video			
Receipt			
CI Report			
9202			
Order			
Aff. Posting		Reviewed by: KT	
Status Rpt		Reviewed on: 10/3/12	
UCCJEA		Updates:	
Citation		Recommendation:	
FTB Notice		File 12 - Barrera	

Atty

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

Age:	NEEDS/PROBLEMS/COMMENTS:
DOD:	
	OFF CALENDAR. Order for Final
Cont. from	Distribution was signed on 6/20/12
Aff.Sub.Wit.	
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	D. 1. 11 1/7
Aff. Posting	Reviewed by: KT
Status Rpt	Reviewed on: 10/3/12
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 13 - Highly

Atty Hernandez, Maria E. (pro per – maternal aunt/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Ag	e: 4		TEMPORARY EXPIRES 10/09/12	NE	EDS/PROBLEMS/COMMENTS:
			MARIA E. HERNANDEZ , Maternal Aunt, is Petitioner.	1. 2.	Need Notice of Hearing. Need proof of service by mail at least 15
Со	nt. from Aff.Sub.Wit.		Father: PEDRO RIVERA – Consent & Waiver of Notice filed 08/14/12		days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person
√	Verified Inventory		Mother: ILA HERNANDEZ – Consent & Waiver of Notice filed 10/02/12		or Consent & Waiver of Notice or Declaration of Due Diligence for: - Pedro Rivera (paternal grandfather)
	PTC Not.Cred.		Paternal Grandfather: PEDRO RIVERA Paternal Grandmother: VIRGINIA RIVERA		- Virginia Rivera (paternal grandmother)- Domingo Hemandez (maternal
	Notice of Hrg Aff.Mail	X	Maternal Grandfather: DOMINGO HERNANDEZ		grandfather) - Rose Mejia (maternal grandmother)
	Aff.Pub. Sp.Ntc.	Λ	Maternal Grandmother: ROSE ANGELA MEJIA	3.	Need UCCJEA (Form GC-120) with the minor's residence history and other information pursuant to Probate Code
✓ ✓	Pers.Serv. Conf. Screen Letters	n/a	Petitioner alleges the child has been in her care for 3 ½ years. The mother is out on the streets and has been hanging around drug houses. The father is a known drug		§1510.
✓	Duties/Supp Objections		user and has been ordered to stay away from the minor by CPS. The mother has made threats that she will come for her		
	Video Receipt		son. She has already picked up another child from her grandmother's care. She		
✓ ✓	9202 Order		has no residence and if she takes him he will end up in one of the drug homes. None of the other relatives are in a position to		
	Aff. Posting Status Rpt		care for the minor. Court Investigator Samantha Henson filed	Re	eviewed by: JF eviewed on: 10/03/12
	UCCJEA Citation FTB Notice	X	a report on 10/02/12.	Re	odates: ecommendation: e 14 – Rivera
					14

Sergio Zaragoza, Jannel Zaragoza, and Case No Dominic Zaragoza (GUARD/P) Zaragoza, Evangelina O. (Pro Per – Paternal Grandmother – Petitioner) Petition for Appointment of Guardian of the Person (Prob. C. 1510) Atty

Ser	gio: Age 14	TEMPORARY (SERGIO ONLY) EXPIRES 10-9-12	NEEDS/PROBLEMS/COMMENTS:	
Jannel: Age 12			Minute Order 9 21 12: The Court	
Dominic: Age 8		EVANGELINA O. ZARAGOZA , Paternal Grandmother, is Petitioner.	Minute Order 8-21-12: The Court grants the petition as to Sergio	
			Zaragoza and denies the petition as	
		Father: SERGIO ZARAGOZA , consents and waives	to Jannel Zaragoza and Dominic Zaragoza. The Court notes that Jannel	
	Aff.Sub.Wit.	notice	and Dominic are currently with the	
~	Verified	1	maternal grandmother. The	
	Inventory	Mother: LILLY M. SOLORIO, present at temporary	temporary expires on 10/9/12. The	
	PTC	hearing	Court orders that the court investigator contact DSS regarding Jannel and	
	Not.Cred.	Paternal grandfather: Jesus Zaragoza	Dominic and also speak with Melissa	
	Notice of Hrg X		Malone, Cultural Broker with the Family Advocate Program. The Court is	
	Aff.Mail X	Maternal grandfather: Ruben Solorio	ordering DSS intervention. Parties are	
	Aff.Pub.	Maternal grandmother: Lilly Solorio	directed to speak with Melissa Malone	
	Sp.Ntc.	Minor Sergio Zaragoza consents, waives notice.	immediately following today's hearing. The General Hearing remains set for	
	Pers.Serv. X		10/9/12. Petition granted.	
~	Conf. Screen	Petitioner states she has cared for her		
>	Letters	grandchildren for a large majority of their life as both parents have a long history of drug	Need Notice of Hearing.	
~	Duties/Supp	addiction and cannot provide them with a	2. Need proof of personal service of	
	Objections	suitable environment. Recently CPS intervened	Notice of Hearing with a copy of	
	Video	and strongly suggested that Petitioner seek	the Petition at least 15 days prior to the hearing per Probate Code	
	Receipt	immediate guardianship to protect the children.	§1511 on:	
	CI Report	Court Investigator Jo Ann Morris filed a report on 9-	- Lilly M. Solorio (Mother)	
	9202	24-12.	3. Need proof of service of Notice of	
~	Order		Hearing with a copy of the	
			Petition at least 15 days prior to	
			the hearing per Probate Code §1511 on:	
			- Jesus Zaragoza (Paternal	
			Grandfather)	
			- Ruben Solorio (Matemal	
			Grandfather) - Lilly Solorio (Maternal	
			Grandmother)	
			·	
	Aff. Posting		Reviewed by: skc	
.4	Status Rpt	<u> </u> 	Reviewed on: 10-3-12	
~	UCCJEA		Updates:	
	Citation	4	Recommendation: File 15 - Zaragoza	
	FTB Notice		riie 15 - Zaragoza	

Atty Cha, Cheng (Pro Per – Maternal Aunt – Petitioner)

Atty Xiong, Lia (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510

and Grandmother, are Petitioners. Father: DAVIE YANG Aff.Sub.Wit. Verified Mother: MAY CHA Consents and waives notice	 Need Notice of Hearing. Need proof of personal service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1511 or consent and waiver of notice or declaration of due diligence on:
PTC Paternal Grandfather: Unknown Paternal Grandfather: Unknown Paternal Grandfather: Unknown Maternal Grandfather: Yang Cha Consents and waives notice	- Davie Yang (Father) 3. Need proof of service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1511 or consent and waiver of notice or declaration of due diligence on: - Paternal Grandfather - Paternal Grandmother - Joshua Ly (half-sibling, age 12, with copy to his parent or guardian per Cal. Rules of Court 7.51) Note: Petitioner filed a Declaration of Due Diligence that states the father has not been in the child's life; therefore, the grandparents are unknown. However, the declaration does not state whether any efforts were made to locate and serve the father or to identify and serve the paternal grandparents.
	Reviewed by: skc
	Reviewed on: 10-3-12
	Updates:
Citation R	Recommendation:
FTB Notice F	File 16 - Cha

Aaliyah Christine Hanoum (GUARD/P)
Rivas-Gonzalez, Natalie Sandra (Pro Per – Maternal Aunt – Petitioner)
Gonzalez, Ramon Jr. (Pro Per – Maternal Uncle – Petitioner) Atty

Atty

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age	e: 14	GENERAL HEARING 11-27-12	NEEDS/PROBLEMS/ COMMENTS:
		NATALIE SANDRA RIVAS-GONZALEZ and RAMON GONZALEZ,	
		JR. , Maternal Aunt and Uncle, are Petitioners.	Note: Petitioner filed two
			temporary petitions on 9-24- 12 and 9-28-12 for this 10-9-
	Aff.Sub.Wit.	Father: DAMEN JEFFERY HANOUM	12 and 7-26-12 for this 10-7- 12 hearing date.
		Mother: IRENE ROSALINDA HANOUM	12 Hearing date.
~	Verified		1. Need "Duties of
	Inventory	Paternal Grandfather: Jeff Hanoum	Guardian" form signed
	PTC	Paternal Grandmother: Christina Hanoum	by Petitioner Ramon
	Not.Cred.	- Letter in support attached to Temp Petition #2	Gonzalez, Jr.
	Notice of Hrg X	Maternal Grandfather: Ramon Gonzalez, Sr. (Deceased)	2. Need Notice of Hearing.
	Aff.Mail	Maternal Grandmother: Anna Marie Gonzalez (Deceased)	
	Aff.Pub.	Siblings: Melina Hanoum, Melinda Hanoum, Rodrigo Gonzalez,	3. Need proof of personal
	Sp.Ntc.	Olivia Gonzalez, Unknown (ages not listed)	service of Notice of
	Pers.Serv. X	Cirria Corizatoz, orna torrir (agos noristoa)	Hearing with a copy of
~	Conf. Screen X	Minor Aaliyah Hanoum consents and waives notice.	the temporary petition(s) at least five court days
~	Letters	,	prior to the hearing per
~	Duties/Supp X	Petitioners state the mother has no permanent address.	Probate Code §2250(e)
	Objections	Aaliyah has been tossed around and has not been able to	on:
	Video	attend school regularly. Aaliyah has come to Petitioners	- Damen Hanoum
	Receipt	several times because her mother fails to provide adequate	(Father) - Irene Hanoum (Mother)
	CI Report	housing, schooling, medical care. She has no supervision and	- liene nanoom (Momer)
	9202	no one willing to take her to school. She is crying for stability,	
~	Order	love and discipline. The police have forced her three times to	
	Aff. Posting	go back with her mom even though it wasn't the best because there were no guardianship orders. Petitioners plead	Reviewed by: skc
	Status Rpt	to please grant temporary guardianship. She had been left	Reviewed on: 10-3-12
~	UCCJEA	with her 18-year old sister, who supports this petition, but is	Updates:
	Citation	currently in Petitioners' care since 9-21-12.	Recommendation:
	FTB Notice	Containing in the difficulties of Care Single 7 21 12.	File 17 - Hanoum
		Petitioners request to be excused from having to search for the	1
		mother and from giving notice to mother and the father	
		because the mother is has no address to be served and does	
		not work, and is homeless, and the father is incarcerated.	
		Petitioner states she has the child's sister who has the minor in	
		her care but wants to bring her to Petitioners because she	
		can't provide for this minor. It is urgent that temporary orders	
		be granted to put the minor in school.	
		Allocate at any father from the profession of Post College W	
		Attached are letters from the minor requesting to stay with	
		Petitioners, and letters in support from the minor's oldest sister	
<u> </u>		and a brother in law.	
			17

Atty

Harris, Carolyn J (pro per Petitioner/mother)

Petition for Appointment of Temporary Conservator of the Person

Age: 23 years	GENERAL HEARING 11/8/12	NEEDS/PROBLEMS/COMMENTS:
	=	
	CAROLYN HARRIS, mother, is petitioner.	
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC	Court Investigator Jennifer Young's Report	
Not.Cred.	filed on 10/1/12.	
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report	4	
9202	4	
Order	4	D
Aff. Posting	4	Reviewed by: KT
Status Rpt	-	Reviewed on: 10/3/12
UCCJEA Citation	-	Updates: Recommendation:
- 	-	
FTB Notice		File 18 - Copeland